

## TOPIC 2: REFERENCE TABLES

The purpose of this topic is to present the Reference Tables associated with Time and Leave Processing. These reference tables contain pertinent information that you will need to understand as you process time and leave data.

Reference tables provide valid values for use on transactions and documents, reference data to other tables and information used for processing and reporting.

At the end of this topic, you will be able to:

- Access the reference tables related to Time and Leave
- Describe how reference tables are used in Time and Leave processing



## REFERENCE TABLES

**Leave Policy**

Leave Policy:

Effective Date:  /  /

Expiration Date:  /  /

Short Description:

Long Description:

Leave Year Ending Month:

☐ Automate Leave Accrual

**Pay Policy**

	Pay Policy	Effective Date	Expiration Date	Short Description	Long Description
1	<input type="text"/>				
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

**Event Category**

Category:  Effective Date:  /  /  Expiration Date:  /  /

Short Description:  Long Description:

Event Type:

Leave Definition:

☐ Week  
☐ Day  
☐ Hour  
☒ Not Applicable

Leave Category Calculation:

☐ Inception to Date  
☐ Year to Date  
☐ Leave Year to Date  
☒ Not Applicable

☐ Store Weekly Pay Totals

Check Leave Balance: ☐ Yes ☐ No ☒ N/A

Print Information on Check: ☐ Yes ☐ No ☒ N/A

Fringe Pay Type: ☐ Yes ☐ No ☒ N/A

Include in Subject Gross: ☐ Yes ☐ No ☒ N/A

Check Print Sequence:

Reserve Accrual Pay Type:

Reserve Payout Pay Type:



## REFERENCE TABLES

Let's review a few of the reference tables that support time and leave processing:

**Leave Policy (LPOL)** – The Leave Policy (LPOL) table determines the type of leave for which an employee is eligible and also groups employees that share the same rules for leave. The employee may be enrolled in a leave policy in three ways: the policy is indicated on the Sub-Title (STTL) window for the employee's sub-title; a policy may be indicated on the Position Status Maintenance window (PSMT) that overrides the sub-title policy; or the leave policy may be indicated as an employee override on the employee's Employment Status Maintenance (ESMT) window. Leave categories and events are linked to leave policies through the Leave Policy (LPOL), Leave Category (LPCT) and Leave Event (LPET) windows. These windows provide further fields for making specifications about leave activity within each leave policy.

**Pay Policy (PPOL)** – The Pay Policy (PPOL) table defines the codes, which describe valid pay policies applicable each pay period. The system refers to these policies when processing employee transactions or documents. The number of policies you set up reflects the amount of control you want over pay processing. For example, you can set up an exception and positive pay policy, or you can set up more specified policies such as exception-administrative, exception-technical, and positive-administrative and positive-technical.

**Category (CATG)** - The Event Category (CATG) table defines and identifies the types of categories including pay, deduction and leave events. This window defines how events are summarized and stored on the employee's records, how the leave category balances are calculated (i.e., year-to-date, inception-to-date, etc.), and how the leave category amounts are defined (i.e., hourly, daily, etc.). The category is also used for pay and deduction reporting purposes (i.e., W-2 and 941 reporting) and check printing. It allows the amounts for each category to be selected to appear on the check in a chosen order.

# REFERENCE TABLES



**Event Type**

Event Type:   
 Effective Date:  /  /       Expiration Date:  /  /   
 Event Type ID:  Pay  Category:  Expense Category:   
 Short Description:  Long Description:

**Pay Event Info**    **Addl Pay Event Info**    **Leave Event Info**    **Additional Info**

Pay Input Units: ☐ Time ☐ Dollars ☐ Units ☒ Not Applicable  
☐ Include in Service Hours      Pay Acceptance Priority Number:   
 Employer Paid Fringe: ☐ Yes ☐ No ☒ N/A      System Generated Pay: ☐ Exclude Event  
 Accept Negative Pay Parameters: ☐ Yes ☐ No ☒ N/A      ☐ Include Event  
 Use Pay Policy Event Type Rate: ☐ Yes ☐ No ☒ N/A      ☒ Not Applicable  
 Withholding Subject to: ☐ Flat Tax - All Payrolls      Store Pay Results at: ☐ Component Level  
☒ Marginal Tax - Regular, Replace, Advance      ☐ Aggregate Level  
☐ Marginal Tax - All Payrolls      ☒ Not Applicable

[Pay Frequencies](#)

**Leave Policy Type**

Leave Policy:       Leave Type:   
 Effective Date:  /  /       Expiration Date:  /  /   
 Short Description:       Long Description:   
 Leave Category:       Secondary Leave Category:   
 Leave Factor:   
 Minimum Units Amount:       Maximum Units Amount:   
 Incremental Units Amount:

[Leave Frequency](#)

Weekly: ☐      Biweekly: ☐      Semi-monthly: ☐  
 Monthly: ☐      Annual: ☐

[Substitute Leave Type](#)

[Include / Exclude Pay Type](#)

☐ Automate Accrual  
 Pay Type: ☐ Include Indicated  
☐ Exclude Indicated  
☒ Include All

**Leave Progression Rule**

Leave Policy:       Leave Type:       Leave Category:

	Maximum Service	Minimum Service	Leave Progression	Short Description	Long Description
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					



## REFERENCE TABLES

**Event Type (EVNT)** – The Event Type (EVNT) table defines and identifies pay and leave events that are available in each event category, such as regular pay and leave without pay. The leave events can be either leave usage or leave accruals. Leave usage differs from leave accrual in that leave usage usually triggers pay. The leave usage event indicates which leave balance is decreased and also which type of pay is produced. The event codes are primarily used on time and leave documents.

**Leave Policy Type (LPET)** – The Leave Policy Type (LPET) window links a leave policy to specific leave events. A leave event must be linked to an employee's policy in order for the employee to use or accrue with a particular leave event. The leave event must be established on the Event Type (EVNT) window before it can be linked to a specific leave policy on LPET. Once it is established as an event, it can be linked to any number of leave policies. Sick leave accrual, for example, can be established on EVNT as an event, and then linked and customized for each particular leave policy on a unique LPET for each leave policy.

If the leave policy, leave type, and leave progression combination is not defined on the Leave Progression Rule (LPRL) window, the leave progression must have a leave progression rule defined for the leave type and leave policy of \*\*\*\*\*. Valid values are located on the Leave Policy (LPOL), Event Type (EVNT) and the Leave Progression Rule (LPRL) windows.

**Leave Progression Rule (LPRL)** – The Leave Progression Rule (LPRL) window is used to track the various, progressively increasing leave accrual rates of employees. Since employees typically earn leave based on length of service, this window provides a mechanism for retrieving leave accrual rates, based on length of service, from the Leave Rate (LPRT) window. The system calculates length of service based on event date and the leave progression start date from the employee's assignment record. The system calculates the employee's leave accrual rates based on their length of service. The minimum and maximum service fields represent the number of months the employee has worked.



# REFERENCE TABLES

**Leave Rate**

Leave Information

Policy  Chart  Grade   
 Step  Progression  Type

	Payment Frequency	Effective Date	Expiration Date	Guaranteed Min Accrual	Minimum Required Hrs	Standard Required Hrs	Standard Accrual Rate
1							
2							
3							
4							
5							
6							
7							
8							

**Leave Category**

Leave Policy  Leave Category   
 Leave Chart  Leave Progression   
 Effective Date  /  /  Expiration Date  /  /   
 Short Description   
 Long Description

Balance Check Frequency  
☒ Monthly  
☐ Annually

Daily Threshold Amounts / Dispositions

Minimum Threshold   
 Minimum Disposition  Accept and Report  
 Maximum Threshold   
 Maximum Disposition  Accept and Report

Periodic Threshold Amounts / Actions

Minimum Threshold   
 Minimum Action   
 Maximum Threshold   
 Maximum Action

**Pay Event Type**

Pay Policy  Pay Type   
 Effective Date  /  /  Expiration Date  /  /   
 Short Description   
 Long Description   
 Pay Type Amount   
 Minimum Units Amount   
 Incremental Units Amount   
 Pay Type Factor Amount   
 Maximum Units Amount   
 Guaranteed Minimum Amount

Override Reserve Accrual  
☐ Yes  
☐ No  
☒ N / A

Event Calculated as  
☒ Factor  
☐ Amount

Override Contract Information

Exception Pay ☐ Yes ☐ No ☒ N / A  
 Adjustment Pay ☐ Yes ☐ No ☒ N / A  
 Positive Pay ☐ Yes ☐ No ☒ N / A

	Component Event Type	Rate of Pay Event Type	Pay Percent
1			
2			
3			
4			
5			
6			
7			



## REFERENCE TABLES

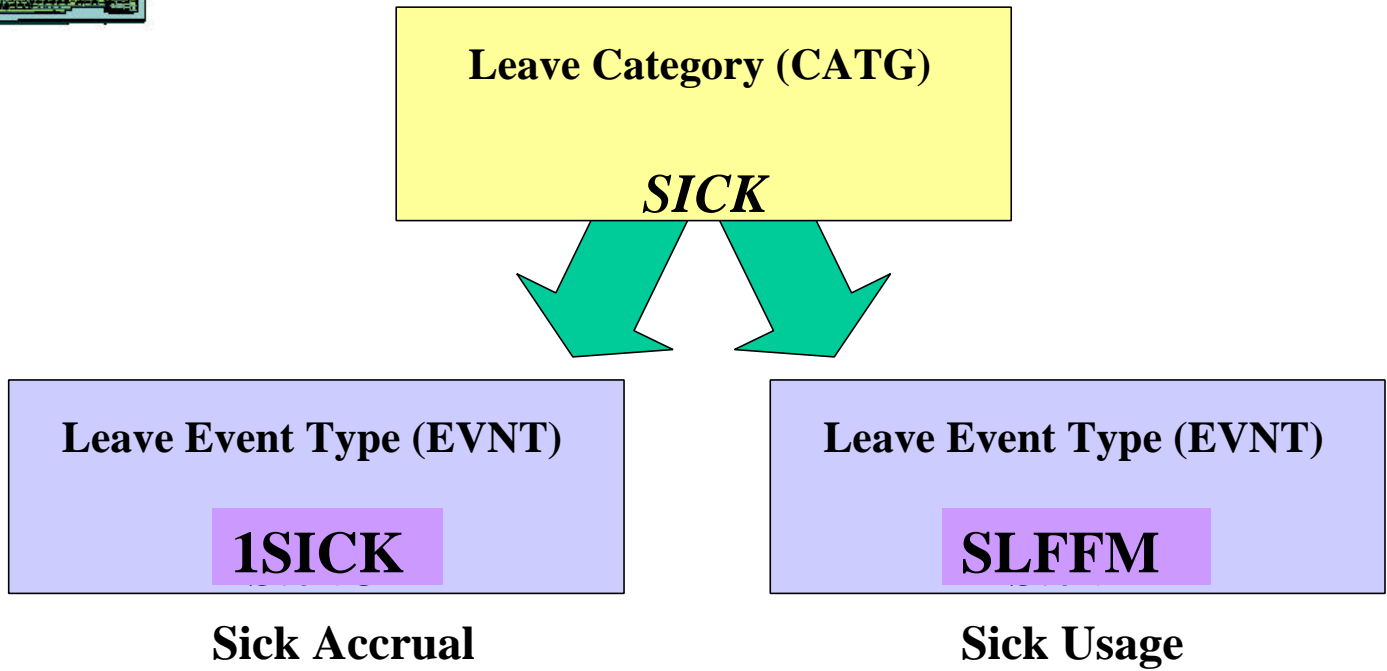
**Leave Rate (LPRT)** – The Leave Rate (LPRT) window is used to define the guaranteed minimum leave accrual, the minimum number of hours required for accrual, the standard number of hours required and the standard accrual rate for each leave type. The guaranteed minimum accrual and the standard accrual rate are expressed in the basis for the leave type and the minimum and standard required hours are always expressed in hours. Prorated accruals are based on the ratio of included hours worked to standard hours multiplied by standard accrual rate.

**Leave Category (LPCT)** – The Leave Category (LPCT) window is used to identify what values, already identified on Event Category (CATG), belong to each of the values identified as Leave Policies on LPOL. The minimum and maximum of Leave balance are defined for daily leave processing and a disposition is specified when the minimum or maximum is exceeded.

The Leave Category (LPCT) window lists all leave categories for a given leave policy. A leave category defines a type of leave balance. For each category in this window, out of bounds thresholds for a leave balance are defined for daily leave processing and an out of bounds action is specified for each out of bounds condition. If your organization has developed a periodic leave balance checking program, out of bounds thresholds and actions are also defined. Furthermore, this window indicates the frequency of periodic balance checking for a given category.

**Pay Event Type (PPET)** – The Pay Event Type (PPET) window defines whether or not a pay event is valid for a specified pay policy and defines how pay for the event is calculated.

## OVERVIEW OF LEAVE SETUP



NOTES





## OVERVIEW OF LEAVE SETUP

Leave policies represent a grouping of leave categories for which a set of employees is eligible. The leave policy for which an employee is eligible is usually determined by the employee's Subtitle (STTL), which is found on their Employment Status Maintenance (ESMT) record. Some employees may have an override leave policy entered on the Employment Status Maintenance (ESMT) window.

The highest level at which leave information is summarized is the leave category. Each category will usually contain at least two leave events. Leave events represent leave actions. There are two types of leave actions – a usage and an accrual. The usage represents a decrease in the leave balance and the accrual represents an increase in the leave balance. The leave balance itself, which represents the result of all accrual and usage activity, is stored in or rolled up to the leave category. The leave category is the summary level for all leave event activities and is displayed on reports, check stubs and inquiry windows. All leave events must be assigned to a category. The leave category is set up on Category (CATG) and the leave events on Event (EVNT).

We will review the reference tables individually beginning with the Category (CATG) table.



## CATEGORY (CATG)

**Event Category**

Category:  Effective Date:  /  /  Expiration Date:  /  /

Short Description:  Long Description:

Event Type:  Pay Type:

Leave Definition:

- ☐ Week
- ☐ Day
- ☐ Hour
- ☒ Not Applicable

Leave Category Calculation:

- ☐ Inception to Date
- ☐ Year to Date
- ☐ Leave Year to Date
- ☒ Not Applicable

☐ Store Weekly Pay Totals

Check Leave Balance: ☐ Yes ☐ No ☒ N/A

Print Information on Check: ☐ Yes ☐ No ☒ N/A

Fringe Pay Type: ☐ Yes ☐ No ☒ N/A

Include in Subject Gross: ☐ Yes ☐ No ☒ N/A

Check Print Sequence:

Reserve Accrual Pay Type:

Reserve Payout Pay Type:



## NOTES

## EVENT CATEGORY (CATG)

The Event Category (CATG) window defines and identifies the types of categories including pay, deduction, and leave events. This window defines how events are summarized and stored on the employee's records, how the leave category balances are calculated (i.e., year-to-date, inception-to-date, etc.), and how the leave category amounts are defined (i.e., hourly, daily, etc.). The category is also used for pay and deduction reporting purposes (i.e., W-2 and 941 reporting) and check printing. It allows the amounts for each category to be selected to appear on the check in a chosen order.

**Step 1** To open CATG from the SAM II Desktop Navigator window, click on the Go To button. Type **CATG** in the **CODE**. Click on the Open button.

**Step 2** Populate the following field to narrow your search on the CATG window.

**CATEGORY** - This field indicates the Category code. Type **ANNUL**.

Select **Display: Browse Data**.

**Step 3** Information for the specific Category you entered in Step 2 should now appear. Let's review the remaining fields.

**EFFECTIVE DATE** - This field indicates the date this category becomes effective.

**EXPIRATION DATE** - This field indicates the date the category expires.

**SHORT DESCRIPTION** - This field indicates the short description defining the category code.

**LONG DESCRIPTION** - This field indicates the long description of the category code if a more detailed description is needed.

**EVENT TYPE** - This field indicates the value ('Leave Type') that indicates the type of event represented in this field. Valid values are Pay Type, Leave Type, Reimbursable Expenditure, FLSA Pay Type and Deduction Type.

**LEAVE DEFINITION** - This field indicates whether leave category amounts are in weeks, days or hours. Valid values are Week, Day, Hour and Not Applicable.

# CATEGORY (CATG)



Event Category			
Category	<input type="text"/>	Effective Date	<input type="text"/> / <input type="text"/> / <input type="text"/> Expiration Date <input type="text"/> / <input type="text"/> / <input type="text"/>
Short Description	<input type="text"/>	Long Description	<input type="text"/>
Event Type	<input type="text" value="Pay Type"/>		
Leave Definition		Leave Category Calculation	
<input type="radio"/> Week <input type="radio"/> Day <input type="radio"/> Hour <input checked="" type="radio"/> Not Applicable		<input type="radio"/> Inception to Date <input type="radio"/> Year to Date <input type="radio"/> Leave Year to Date <input checked="" type="radio"/> Not Applicable	
		<input type="checkbox"/> Store Weekly Pay Totals	
Check Leave Balance	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A	Check Print Sequence	<input type="text"/>
Print Information on Check	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A	Reserve Accrual Pay Type	<input type="text"/>
Fringe Pay Type	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A	Reserve Payout Pay Type	<input type="text"/>
Include in Subject Gross	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A		



## NOTES



## CATEGORY (CATG)

**Step 3** Continue to review the remaining fields.

**LEAVE CATEGORY CALCULATION** - This field indicates how category's balance is calculated (i.e. Inception to Date, Year to Date, Leave Year to Date and Not Applicable).

**STORE WEEKLY PAY TOTALS** – This field indicates what information should be stored in the weekly pay totals for this category.

**CHECK LEAVE BALANCE** - This field indicates whether the system will check leave balances based on user specified conditions.

**PRINT INFORMATION ON CHECK** - This field indicates whether the current amount and year-to-date summary amount for the leave category should be printed on the employees' checks.

**FRINGE PAY TYPE** - This field indicates whether the category is an employer paid fringe benefit.

**INCLUDE IN SUBJECT GROSS** - This field indicates whether the fringe pay category should be included in subject gross for purposes of tax withholding.

**CHECK PRINT SEQUENCE** - This field indicates the print processing order for the defined category type.

**RESERVE ACCRUAL PAY TYPE** - This field indicates the pay type used to accrue reserve pay.

**RESERVE PAYOUT PAY TYPE** - This field indicates the pay type used to pay out reserve amounts.

## EVENT TYPE (EVNT)



**Event Type**

Event Type:

Effective Date:  /  /       Expiration Date:  /  /

Event Type ID:  Pay       Category:       Expense Category:

Short Description:       Long Description:

Pay Event Info    Addtl Pay Event Info    Leave Event Info    Additional Info

Pay Input Units    ☐ Time    ☐ Dollars    ☐ Units    ☒ Not Applicable

☐ Include in Service Hours      Pay Acceptance Priority Number:

Employer Paid Fringe    ☐ Yes    ☐ No    ☒ N/A      System Generated Pay

Accept Negative Pay Parameters    ☐ Yes    ☐ No    ☒ N/A      ☐ Exclude Event

Use Pay Policy Event Type Rate    ☐ Yes    ☐ No    ☒ N/A      ☐ Include Event

Withholding Subject to      Store Pay Results at

☐ Flat Tax - All Payrolls      ☐ Component Level

☒ Marginal Tax - Regular, Replace, Advance      ☐ Aggregate Level

☐ Marginal Tax - All Payrolls      ☒ Not Applicable

[Pay Frequencies](#)



## NOTES

## EVENT TYPE (EVNT)

The Event Type (EVNT) window defines and identifies pay and leave events that are available in each event category such as regular pay and leave without pay. The leave events can be either leave usage or leave accruals. Leave usage differs from leave accrual in that leave usage usually triggers pay. The leave usage event indicates which leave balance is decreased and also which type of pay is produced. The event codes are primarily used on time and leave transactions. This window has four panels or tabs.

Two of the panels or tabs on the EVNT table deal mostly with pay; and the other two deal mostly with leave. Further, many leave events impact pay and therefore have pay information tied to them. We will look at each panel or tab mainly in terms of its relationship to setting up Time & Leave.

**Step 1** To open EVNT from the SAM II Desktop Navigator window, click on the Go To button. Type **EVNT** in the **CODE**. Click on the Open button.

**Step 2** Populate the following field in the header to narrow your search on the EVNT window.

**EVENT TYPE** - This field indicates pay, leave and other payroll events (for example, AL for Annual Leave Usage). Type **AL**.

Select **Display: Browse Data**.

**Step 3** Information for the specific Event Type you entered in Step 2 should now appear. Let's review the remaining fields.

**EFFECTIVE DATE** - This field indicates the date this leave event becomes effective.

**EXPIRATION DATE** - This field indicates the last date the information for this leave event is in effect.

**EVENT TYPE ID** - This field indicates the event type. Valid values are Pay, Leave, Reimbursable Expenditure and FLSA Pay.

**CATEGORY** - This field indicates the category code into which units and amounts associated with this event are summarized. Valid values are located on the Event Category (CATG) window.

**EXPENSE CATEGORY** - This field indicates where the expense category event should be charged. Valid values are located on the Expense Category (PEXP) window.



## EVENT TYPE (EVNT)

**Event Type**

Event Type:

Effective Date:  /  /       Expiration Date:  /  /

Event Type ID:       Category:       Expense Category:

Short Description:       Long Description:

Pay Event Info    Addtl Pay Event Info    Leave Event Info    Additional Info

Pay Input Units:    ☐ Time    ☐ Dollars    ☐ Units    ☒ Not Applicable

☐ Include in Service Hours      Pay Acceptance Priority Number:

Employer Paid Fringe:    ☐ Yes    ☐ No    ☒ N/A      System Generated Pay

Accept Negative Pay Parameters:    ☐ Yes    ☐ No    ☒ N/A      ☐ Exclude Event

Use Pay Policy Event Type Rate:    ☐ Yes    ☐ No    ☒ N/A      ☐ Include Event

Withholding Subject to:      Store Pay Results at:      [Pay Frequencies](#)

☐ Flat Tax - All Payrolls      ☐ Component Level     

☒ Marginal Tax - Regular, Replace, Advance      ☐ Aggregate Level

☐ Marginal Tax - All Payrolls      ☒ Not Applicable



## NOTES





## EVENT TYPE (EVNT)

**Step 3** Continue to review the remaining fields.

**SHORT DESCRIPTION** - This field indicates the short description of the event code.

**LONG DESCRIPTION** This field indicates the long description of the event code.

### PAY EVENT INFO

The Pay Event Info panel contains pay parameters for event types.

**PAY INPUT UNITS** - This field indicates the appropriate codes to define the input units for this pay event. Valid values are Time, Dollars and Units.

**INCLUDE IN SERVICE HOURS** - This field indicates whether the pay event should be included in the service hours calculation.

**PAY ACCEPTANCE PRIORITY NUMBER** - This field indicates the processing priority for pay.

**EMPLOYER PAID FRINGE** - This field indicates if the event is an employer paid fringe.

**ACCEPT NEGATIVE PAY PARAMETERS** – This field indicates if a pay parameter using this event can be set up as a negative amount.

**USE PAY POLICY EVENT TYPE RATE** - This field indicates whether pay resulting from the event should be calculated using a pay rate set up for each pay policy on the Pay Event Type (PPET) window.

**SYSTEM GENERATED PAY** - This field indicates whether system generated pay for exception paid employees should be excluded, included or left blank.

**WITHHOLDING SUBJECT TO-** This field indicates the type of withholding to be taken on the pay event. Valid values are Flat Tax-All Payrolls, Marginal Tax-Regular, Replace, Advance, and Marginal Tax-All Payrolls.

**STORE PAY RESULTS AT** - This field indicates a value to identify the component calculation level. Valid values are Component Level, Aggregate Level, and Not Applicable.

**PAY FREQUENCIES** - This field indicates the frequency with which the event should be paid for weekly, biweekly, semimonthly, monthly, and annually paid employees.

## EVENT TYPE (EVNT)



**Event Type**

Event Type:   
 Effective Date:  /  /       Expiration Date:  /  /   
 Event Type ID:  Pay       Category:       Expense Category:   
 Short Description:       Long Description:

Pay Event Info    Addtl Pay Event Info    Leave Event Info    Additional Info

Pay Input Units    ☐ Time    ☐ Dollars    ☐ Units    ☒ Not Applicable  
☐ Include in Service Hours      Pay Acceptance Priority Number:   
 Employer Paid Fringe    ☐ Yes    ☐ No    ☒ N/A      System Generated Pay  
 Accept Negative Pay Parameters    ☐ Yes    ☐ No    ☒ N/A      ☐ Exclude Event  
 Use Pay Policy Event Type Rate    ☐ Yes    ☐ No    ☒ N/A      ☐ Include Event  
    ☒ Not Applicable  
 Withholding Subject to      Store Pay Results at  
☐ Flat Tax - All Payrolls      ☐ Component Level      [Pay Frequencies](#)  
☒ Marginal Tax - Regular, Replace, Advance      ☐ Aggregate Level  
☐ Marginal Tax - All Payrolls      ☒ Not Applicable

**Event Type**

Event Type:   
 Effective Date:  /  /       Expiration Date:  /  /   
 Event Type ID:  Pay       Category:       Expense Category:   
 Short Description:       Long Description:

Pay Event Info    Addtl Pay Event Info    Leave Event Info    Additional Info

[FLSA Processing Options](#)  
 Include Event in FLSA Calculation    ☐ Yes    ☐ No    ☒ Not Applicable  
 % Hours Included in FLSA:       FLSA Min Wage Rate:       % Pay Included in FLSA:

[Contract and Reserve Pay Settings](#)  
☐ Use Exception Events in Contract Pay      ☐ Use Positive Events in Contract Pay  
☐ Use Adjustment Events in Contract Pay      ☐ Use Events in Reserve Pay

[Accounting Attributes](#)  
 Time Category:       Cost Accounting:  Not Applicable  
 Labor Distribution Agency:       Labor Distribution Profile:   
 Object / Sub:  /       Balance Sheet Account:



## EVENT TYPE (EVNT)

**Step 3** Continue to review the remaining fields.

### ADDTL PAY EVENT INFO

The Additional Pay Event Info panel contains pay parameters for FLSA processing, contact and reserve pay settings and accounting attributes.

**INCLUDE EVENT IN FLSA CALCULATION** - This field indicates whether the event should be included in the FLSA pay calculation.

**% HOURS INCLUDED IN FLSA** - This field indicates the percentage of input hours that is counted towards the employee's hours worked for FLSA purposes. For example, regular time worked would be multiplied by 100% while a shift differential on top of time worked would be multiplied by 0%.

**FLSA MIN WAGE RATE** - This field indicates the FLSA minimum hourly rate.

**% PAY INCLUDED IN FLSA** - This field indicates the percentage of dollars for the pay type that is counted toward FLSA dollars for determining the average hourly wage.

**USE EXCEPTION EVENTS IN CONTRACT PAY** - Missouri is not currently using this functionality.

**USE POSITIVE EVENTS IN CONTRACT PAY** - Missouri is not currently using this functionality.

**USE ADJUSTMENT EVENTS IN CONTRACT PAY** - Missouri is not currently using this functionality.

**USE EVENTS IN RESERVE PAY** - Missouri is not currently using this functionality.

**TIME CATEGORY** - This field indicates the accounting attributes assigned to any overtime hours worked under this pay type. Valid values are located on the Time Category (TIMC) window.

**COST ACCOUNTING** - This field indicates the drop-down list to define which override is used Object/Sub-Object, Labor Distribution Profile, Reserve Pay, Exclude from Accounting Interface, or Not Applicable.

## EVENT TYPE (EVNT)



**Event Type**

Event Type:   
 Effective Date:  /  /       Expiration Date:  /  /   
 Event Type ID: Pay       Category:       Expense Category:   
 Short Description:       Long Description:

Pay Event Info    Addtl Pay Event Info    Leave Event Info    Additional Info

**FLSA Processing Options**

Include Event in FLSA Calculation: ☐ Yes ☐ No ☒ Not Applicable  
 % Hours Included in FLSA:       FLSA Min Wage Rate:       % Pay Included in FLSA:

**Contract and Reserve Pay Settings**

☐ Use Exception Events in Contract Pay      ☐ Use Positive Events in Contract Pay  
☐ Use Adjustment Events in Contract Pay      ☐ Use Events in Reserve Pay

**Accounting Attributes**

Time Category:       Cost Accounting: Not Applicable   
 Labor Distribution Agency:       Labor Distribution Profile:   
 Object / Sub:  /       Balance Sheet Account:

**Event Type**

Event Type:   
 Effective Date:  /  /       Expiration Date:  /  /   
 Event Type ID: Pay       Category:       Expense Category:   
 Short Description:       Long Description:

Pay Event Info    Addtl Pay Event Info    Leave Event Info    Additional Info

**Positive Pay Employees**

Pay Event:       Sign / Override:  /

**Exception Pay Employees**

Pay Event:       Sign / Override:  /   
 Pay Event:       Sign / Override-2:  /

**Usage vs. Accrual**

☐ Accrual  
☐ Usage  
☒ N / A

**Leave Input Units**

☐ Week  
☐ Hour  
☐ Day  
☒ N / A



## EVENT TYPE (EVNT)

**Step 3** Continue to review the remaining fields.

**LABOR DISTRIBUTION AGENCY** - This field indicates the agency code to which the labor expense should be distributed. Valid values are located on the Labor Distribution Profile (LDPR) window.

**LABOR DISTRIBUTION PROFILE** - This field indicates the override labor distribution profile code for this event. Valid values are located on the Labor Distribution Profile (LDPR) window.

**OBJECT/SUB** - This field indicates the override object and sub-object codes to which this event is charged.

**BALANCE SHEET ACCOUNT** - This field indicates the expenses that have been recognized but not yet paid.

### LEAVE EVENT INFO

The Leave Event Info panel contains leave parameters for event types. If the Event Type ID is PAY, this panel will be blank.

#### Positive Pay Employees

**PAY EVENT** - This field indicates the pay event, if the leave event being defined also generates pay (for example, vacation leave also generates vacation pay).

**SIGN/OVERRIDE** - This field indicates if the event generates a payment resulting in a positive pay rate, enter + (plus). If negative, enter - (minus). Valid values are + (plus), - (minus) and blank.

**USAGE VS. ACCRUAL** - This field indicates the whether this leave event increases or decreases a leave balance. Valid values are Accrual, Usage and N/A.

**LEAVE INPUT UNITS** - This field indicates the leave input units to be used for the leave event. Valid values are: Week, Hour, Day and N/A.



## EVENT TYPE (EVNT)

**Event Type**

Event Type:   
 Effective Date:  /  /       Expiration Date:  /  /   
 Event Type ID:  Pay       Category:       Expense Category:   
 Short Description:       Long Description:

Pay Event Info    Addtl Pay Event Info    **Leave Event Info**    Additional Info

**Positive Pay Employees**

Pay Event:       Sign / Override: ☐ / ☐

**Exception Pay Employees**

Pay Event:       Sign / Override: ☐ / ☐  
 Pay Event:       Sign / Override-2: ☐ / ☐

Usage vs. Accrual: ☐ Accrual    ☐ Usage    ☒ N / A  
 Leave Input Units: ☐ Week    ☐ Hour    ☐ Day    ☒ N / A

**Event Type**

Event Type:   
 Effective Date:  /  /       Expiration Date:  /  /   
 Event Type ID:  Pay       Category:       Expense Category:   
 Short Description:       Long Description:

Pay Event Info    Addtl Pay Event Info    Leave Event Info    **Additional Info**

Valid Windows:

User Fields:

### SMART CODING STRUCTURE FOR EVENT TYPE

1 = Accrual Event

2 = System generated pay event associated with pay of leave event

3 = System generated pay event associated with a leave usage event

Alpha = Leave usage

**NOTE:** Event type codes beginning with 2 and 3 will never be used by timekeepers. They will only use codes beginning with 1 or alpha.



## EVENT TYPE (EVNT)

**Step 3** Continue to review the remaining fields.

### Exception Pay Employees

**PAY EVENT** - This field indicates the pay event type which is used to generate a pay event for an exception pay employee when the leave event is processed.

**SIGN/OVERRIDE** - This field indicates if a value is entered in Pay Event for exception pay employees. Valid values are + (plus), - (minus), and blank.

**PAY EVENT** - This field indicates the pay event type, which is used to generate a pay event for an exception pay employee when the leave event is processed.

**SIGN/OVERRIDE-2** - This field indicates if a value is entered in the second Pay Event field for exception pay employees. Valid values are + (plus), - (minus), and blank.

If the leave event you are defining generates pay, enter the **Pay Event** Type code for either a positive or exception paid employee, and the sign used to multiply the input amount (i.e., + plus or - minus). The sign indicates whether the pay received is positive or is a backout of existing pay.

The most common scenario is generating pay events for leave usage events such as sick leave, vacation or military leave. Setting up leave events that generate pay for positive pay employees is slightly different from setting up leave events for exception pay employees.

The first sign for an exception paid employee is also +; however, you must indicate in the second entry field the employee's regular pay event with a - sign. The second entry reduces the generated pay the employee normally receives as 'regular pay'.

### ADDITIONAL INFO

The Additional Info panel allows the user to identify codes of the windows that can use the Event Type code. Further information can be captured in User Fields.

**VALID WINDOWS** - This field indicates the four-character abbreviation of the windows that use the Event Type code (i.e., Enter LEAV so the code can be entered in the Leave Accrual (LEAV) window).

**USER FIELDS** - This field indicates the appropriate code for each field. All ten fields are optional fields and none are edited. For example, Field 1 is used for Data Warehouse reporting.



## LEAVE POLICY TYPE (LPET)

Leave Policy Type																					
Leave Policy	<input type="text"/>																				
Effective Date	<input type="text"/> / <input type="text"/> / <input type="text"/>																				
Short Description	<input type="text"/>																				
Leave Category	<input type="text"/>																				
Leave Factor	<input type="text"/>																				
Minimum Units Amount	<input type="text"/>																				
Incremental Units Amount	<input type="text"/>																				
Leave Type	<input type="text"/>																				
Expiration Date	<input type="text"/> / <input type="text"/> / <input type="text"/>																				
Long Description	<input type="text"/>																				
Secondary Leave Category	<input type="text"/>																				
Maximum Units Amount	<input type="text"/>																				
<input type="checkbox"/> Automate Accrual																					
Pay Type <input type="radio"/> Include Indicated <input type="radio"/> Exclude Indicated <input checked="" type="radio"/> Include All																					
Leave Frequency Weekly <input type="checkbox"/> Biweekly <input type="checkbox"/> Semi-monthly <input type="checkbox"/> Monthly <input type="checkbox"/> Annual <input type="checkbox"/>																					
Substitute Leave Type <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>																					
Include / Exclude Pay Type <table border="1"> <tr> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> </tr> </table>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>												
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>												



## NOTES





## LEAVE POLICY TYPE (LPET)

The Leave Policy Type (LPET) window links a leave policy to specific leave events. A leave event must be linked to an employee's policy in order for the employee to use or accrue leave with a particular leave event. The leave event must be established on the Event Type (EVNT) window before it can be linked to a specific leave policy on the LPET. Once it is established as an event, it can be linked to any number of leave policies. Sick leave accrual, for example, can be established on EVNT as an event, and then linked to each particular leave policy on the LPET.

**Step 1** To open LPET from the SAM II Desktop Navigator window, click on the Go To icon. Type **LPET** in the **CODE**. Click on the Open button.

**Step 2** Populate the following fields to narrow your search on the LPET window.

**LEAVE POLICY** – This field indicates the leave policy. Leave policies define sets of leave processing rules. Valid values are located on the Leave Policy (LPOL) window. Type **STAND**.

**LEAVE TYPE** – This field indicates the leave type code. A leave event type defines the accrual or usage activity allowed in this leave category. Valid values are located on the Event Type (EVNT) window. Type **AL**.

Select **Display: Browse Data**.

**Step 3** Information for the specific Leave Policy you entered in Step 2 should now appear. Let's review the remaining fields.

**EFFECTIVE DATE** – This field indicates the date this leave policy type becomes effective.

**EXPIRATION DATE** – This field indicates the last date that this leave policy type is in effect. The default value is **99/99/99**.

**SHORT DESCRIPTION** – This field indicates the short description of the leave policy type code.

**LONG DESCRIPTION** – This field indicates the long description of the leave type code to further define it as necessary.

**LEAVE CATEGORY** – This field indicates the category to which the leave type belongs. Valid values are located on the Leave Category (LPCT) window.



## LEAVE POLICY TYPE (LPET)

Leave Policy Type									
Leave Policy					Leave Type				
Effective Date	/ /				Expiration Date	/ /			
Short Description					Long Description				
Leave Category					Secondary Leave Category				
Leave Factor									
Minimum Units Amount					Maximum Units Amount				
Incremental Units Amount									
Leave Frequency									
Weekly		Biweekly		Semi-monthly					
Monthly		Annual							
Substitute Leave Type									
Include / Exclude Pay Type									

☐ Automate Accrual  
 Pay Type  
☐ Include Indicated  
☐ Exclude Indicated  
☒ Include All



## NOTES



## LEAVE POLICY TYPE (LPET)

**Step 3** Continue to review the remaining fields.

**SECONDARY LEAVE CATEGORY** – This field indicates the secondary leave category to which the leave type belongs. Valid values are located on the Leave Category (LPCT) window.

**LEAVE FACTOR** – This field indicates the factor amount by which the leave events entered on documents will be multiplied by when the leave accrual or usage is recorded. Normally, a factor of **1** is entered in which case the leave recorded equals the leave amount entered. The federal comp accrual (1FCMP) has a leave factor 1.5.

**MINIMUM UNITS AMOUNT** – This field indicates the minimum unit amount that is allowed for a leave event. For example, if the leave type units are in hours, then entering a value of **1.0** indicates that at least one hour must be entered for the leave event.

**MAXIMUM UNITS AMOUNT** – This field indicates the maximum unit amount that is allowed for a leave event profile update. For example, if the leave type units are in hours, then entering a value of **8.0** indicates that no more than eight hours is allowed for a single leave event.

**INCREMENTAL UNITS AMOUNT** – This field indicates the incremental amount that is allowed for a leave event profile update. For example, if the leave type units are in hours and the incremental amount is **0.10**, all leave event transaction amounts must be in increments of ten minutes. The units are in hours and minutes.

**LEAVE FREQUENCY** – These fields will not be used in Missouri.

**AUTOMATE ACCRUAL** - This field indicates if the leave accrual should be automatically accrued for this leave policy.

**PAY TYPE** – This field indicates whether the pay type is **Include Indicated**, **Exclude Indicated**, or **Include All**.



## LEAVE POLICY TYPE (LPET)

Leave Policy Type									
Leave Policy					Leave Type				
Effective Date	/ /				Expiration Date	/ /			
Short Description					Long Description				
Leave Category					Secondary Leave Category				
Leave Factor									
Minimum Units Amount					Maximum Units Amount				
Incremental Units Amount									
Leave Frequency									
Weekly		Biweekly		Semi-monthly					
Monthly		Annual							
Substitute Leave Type									
Include / Exclude Pay Type									

☐ Automate Accrual  
 Pay Type  
☐ Include Indicated  
☐ Exclude Indicated  
☒ Include All



## NOTES



## LEAVE POLICY TYPE (LPET)

**Step 3** Continue to review the remaining fields.

**SUBSTITUTE LEAVE TYPE** – This field indicates the substitute leave type code, up to five may be used. If an employee's available leave has been used up, the system debits hours from the substitute leave types in the order in which they are listed. All substitute leave type codes must have their own entries.

**INCLUDE/EXCLUDE PAY TYPE** – This field indicates the pay type codes, up to twenty may be used, that are included or excluded in calculating leave. At least one field is required if **Pay Type** is entered; otherwise, leave all fields blank.



## PAY EVENT TYPE (PPET)

**Pay Event Type**

Pay Policy:  Pay Type:

Effective Date:  /  /  Expiration Date:  /  /

Short Description:

Long Description:

Pay Type Amount:

Pay Type Factor Amount:

Minimum Units Amount:

Maximum Units Amount:

Incremental Units Amount:

Guaranteed Minimum Amount:

Override Reserve Accrual: ☐ Yes ☐ No ☒ N / A

Event Calculated as: ☒ Factor ☐ Amount

Override Contract Information

Exception Pay: ☐ Yes ☐ No ☒ N / A

Adjustment Pay: ☐ Yes ☐ No ☒ N / A

Positive Pay: ☐ Yes ☐ No ☒ N / A

	Component Event Type	Rate of Pay Event Type	Pay Percent
1			
2			
3			
4			
5			
6			
7			
8			



## NOTES



## PAY EVENT TYPE (PPET)

The Pay Event Type (PPET) window defines whether or not a pay event is valid for a special pay policy and how pay for that event is calculated.

**Step 1** To open PPET from the SAM II Desktop Navigator window, click on the Go To icon. Type **PPET** in the **CODE**. Click on the Open button.

**Step 2** Populate the following field to narrow your search on the PPET window.

**PAY POLICY** – This field indicates the code for the pay policy for which valid pay events are being established. Valid values are located on the Pay Policy (PPOL) window. Type **STAND**.

**PAY TYPE** – This field indicates the pay type code. There must be an entry for each pay event allowed for a pay policy; otherwise, the system rejects the event when it is entered for an employee covered by the pay policy. Valid values are located on the Event Type (EVNT) window. Event Type ID on Event Type (EVNT) must be Pay. Type **3AL**.

Select **Display: Browse Data**.

**Step 3** Information for the specific Pay Policy you entered in Step 2 should now appear. Let's review the remaining fields of the PPET.

**EFFECTIVE DATE** – This field indicates the date the entry becomes effective.

**EXPIRATION DATE** – This field indicates the last date the information is in effect.

**SHORT DESCRIPTION** – This field indicates the short description of the pay policy code.

**LONG DESCRIPTION** – This field indicates the long description of the pay policy code.

**PAY TYPE AMOUNT** – This field indicates the set amount to be paid for the event if "Use Pay Policy Event Rate" is "Y" on the EVNT.

**PAY TYPE FACTOR AMOUNT** – This field indicates the value by which the input amount (for example, units, hours) is to be multiplied to calculate pay (for example, .5 for standby, 1.5 for overtime).



## PAY EVENT TYPE (PPET)

**Pay Event Type**

Pay Policy	<input type="text"/>	Pay Type	<input type="text"/>
Effective Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	Expiration Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Short Description	<input type="text"/>		
Long Description	<input type="text"/>		
Pay Type Amount	<input type="text"/>	Pay Type Factor Amount	<input type="text"/>
Minimum Units Amount	<input type="text"/>	Maximum Units Amount	<input type="text"/>
Incremental Units Amount	<input type="text"/>	Guaranteed Minimum Amount	<input type="text"/>

Override Reserve Accrual: ☐ Yes ☐ No ☒ N / A

Event Calculated as: ☒ Factor ☐ Amount

Override Contract Information

Exception Pay	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N / A
Adjustment Pay	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N / A
Positive Pay	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N / A

	Component Event Type	Rate of Pay Event Type	Pay Percent
1			
2			
3			
4			
5			
6			
7			
8			



## PAY EVENT TYPE (PPET)



**Step 3** Continue to review the remaining fields.

**MINIMUM UNITS AMOUNT** – This field indicates the minimum number of units that can be input for the pay event for a single occurrence. For example, the minimum amount of time that can be reported can be 10 minutes, which is entered as 0.10

**MAXIMUM UNITS AMOUNT** – This field indicates the maximum number of units that can be input for the pay event for a single occurrence. For example, stand by pay time cannot be allowed to exceed 8 hours.

**INCREMENTAL UNITS AMOUNT** – This field indicates the amount that represents the increment required for reporting a pay event recorded in units (dollars and cents, hours and minutes).

**GUARANTEED MINIMUM AMOUNT** – This field indicates the number of units guaranteed by contract, if appropriate. For example, an employee called back to work can be guaranteed four hours of pay even if the employee does not work four hours.

**OVERRIDE RESERVE ACCRUAL** – This field indicates whether the pay events of this pay event type should be included in reserve pay processing.

**EVENT CALCULATED AS** – This field indicates whether the pay event type has Pay Input Units set to Time on the Event Type (EVNT) window.

**EXCEPTION PAY** – This field indicates whether pay events of this pay event type should be included or excluded in contract pay processing.

**ADJUSTMENT PAY** – This field indicates whether the adjustment pay events of this pay event type should be included or excluded in contract pay processing.

**POSITIVE PAY** – This field indicates whether the positive pay events of this pay event type should be included or excluded in contract pay processing.

## PAY EVENT TYPE (PPET)



**Pay Event Type**

Pay Policy	<input type="text"/>	Pay Type	<input type="text"/>
Effective Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	Expiration Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Short Description	<input type="text"/>		
Long Description	<input type="text"/>		
Pay Type Amount	<input type="text"/>	Pay Type Factor Amount	<input type="text"/>
Minimum Units Amount	<input type="text"/>	Maximum Units Amount	<input type="text"/>
Incremental Units Amount	<input type="text"/>	Guaranteed Minimum Amount	<input type="text"/>

Override Reserve Accrual: ☐ Yes ☐ No ☒ N / A

Event Calculated as: ☒ Factor ☐ Amount

Override Contract Information

Exception Pay	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N / A
Adjustment Pay	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N / A
Positive Pay	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> N / A

	Component Event Type	Rate of Pay Event Type	Pay Percent
1			
2			
3			
4			
5			
6			
7			
8			

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## PAY EVENT TYPE (PPET)



**Step 3** Continue to review the remaining fields.

**COMPONENT EVENT TYPE** – This field indicates which pay events are to be included as components of the pay event.

**RATE OF PAY EVENT TYPE** – This field indicates the pay event code that is used to determine the effective rate of pay for each inclusion.

**PAY PERCENT** – This field indicates the percentage by which the effective rate of pay for the table-driven pay type is multiplied to determine the actual rate of pay for the included event.



## TESTING YOUR KNOWLEDGE

1. What are the two types of leave events? A) \_\_\_\_\_ B) \_\_\_\_\_
2. Leave events are rolled up to \_\_\_\_\_.
3. What fields or choices on the CATG window would let me know this is a leave event?
4. What tabs or panels on EVNT would you use to determine the specific type of leave?
5. Which table is used to determine the type of leave for which an employee is eligible? \_\_\_\_\_

Congratulations. You are now ready to continue to the next topic.